Strategic Sectors | **Economy and Territory**

Tourism and Development: The Sustainability of a Myth

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With 283 million arrivals and 224 billion euros in receipts in 2011, that is, approximately 30% of international tourism in the world, for the countries along the rim of the Mediterranean tourism is an engine of economic growth and, more metaphorically, of development. Though earlier it constituted an artisan sector based on clientele from the aristocracy and the industrial upper middle class until the first half of the 20th century, the democratisation of the leisure society in Western European countries stimulated by the right to paid holidays, the rise in purchasing power and the modernisation of transport has made it a veritable industry since the 1960s.

The political leaders of countries that are "behind on the development scale" – to use the terms of the Bretton Woods institutions –, such as Spain, Greece and Tunisia, have taken the opportunity to attract foreign currency to their territory and use the sector as an "engine for development." A wager in part successful, since if we take the example of Spain's Costa del Sol, the fishing villages of the 1950s along the Mediterranean coast today constitute metropolitan areas highly equipped with infrastructures. But beyond the issue of infrastructures, which we will discuss below, considering how tourism affects the sustainability of the Mediterranean Basin requires basic knowledge of how the industry operates.

Tunisia is a textbook example that powerfully illustrates the characteristics of this industry:

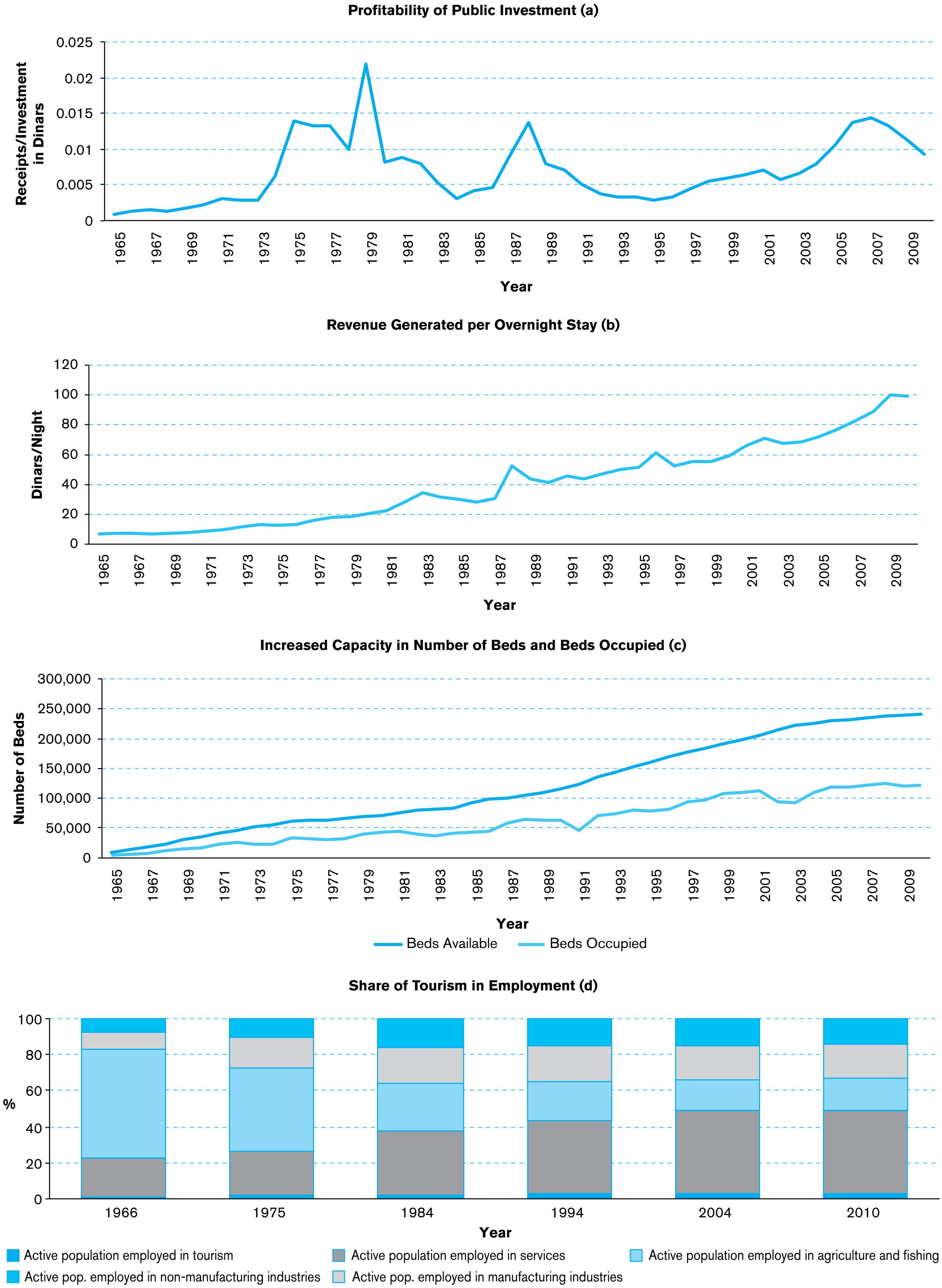
- The copious investments made by the authorities (from 11 billion dinars in 1965 to 376 billion in 2010, i.e. 7,200 billion dinars over the course of 45 years) are "not very profitable" and lead to only very long-term returns on investment, since for every dinar invested, the receipts generated, which went from 7 dinars per overnight stay in 1965 to 100 dinars per overnight stay in 2010, only brought 0.02 dinar (Chart 28 (a) and (b));
- The occupancy rate is low as a result of the strong seasonality effect of tourism, whose peak is attained in July and August, which means the industry functions at half-speed on a year-long scale (Chart 28 (c));
- Though tourism is a major sector for economic growth, representing from 5 to 10% of Tunisia's GDP in the period studied, it only represents 3% of employment (Chart 28 (d)).

These various characteristics give rise to forms of approaching tourism in Mediterranean that can be defined by a formula considered sacrosanct by political leaders in the Mediterranean Region: economic growth through the tourism industry is only possible if the bed-space capacity of destinations is increased with a view to generating a high absolute value of receipts, and this despite a low occupancy rate.

Tourism in the Mediterranean Basin: A New "El Dorado"?

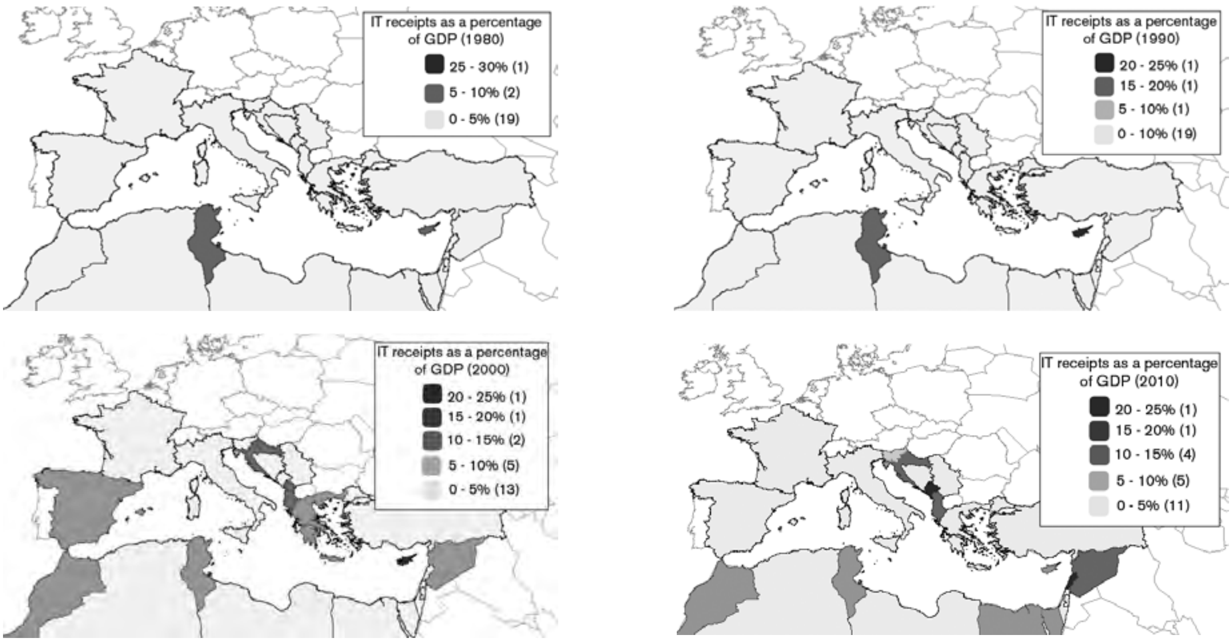
The rules of the game are clear for countries having focussed on tourism: the profitability of this activity is assessed only according to the absolute value of collected receipts. What significance do these receipts have in national economies? The historical analysis of the portion of a country's GDP attributable to international tourism receipts shows the strategic orientation of these countries

CHART 28 **Chronological Analysis of the Development of the Tourism Industry in Tunisia**



Source: Tunisian National Tourism Office (*Office nationale de tourisme tunisien*, ONTT), 2012.

MAP 1 Evolution of the Importance of International Tourism (IT) Receipts in National Economies (%)



Source: World Tourism Organisation (UNWTO), 2012.

as well as their dependence on the industry, as for instance, Tunisia, Cyprus and Malta, for whom, since the 1980s, international tourism represents 7%, 9.5% and 26%, respectively. It is important to note the strengthening of development policies due to tourism since the beginning of the 2000s in Morocco (5% in 2000 and 7% in 2010), Egypt (approximately 4% from 2000 to 2010), Lebanon (4% in 2000 and 20% in 2010), Syria (5.5% in 2000 and 11% in 2010), Albania (10.5% in 2000 and 13.5% in 2010) and the countries of former Yugoslavia (13% for Croatia and 5% for Slovenia from 2000 to 2010, and 16% for Montenegro in 2010) (Map 1).

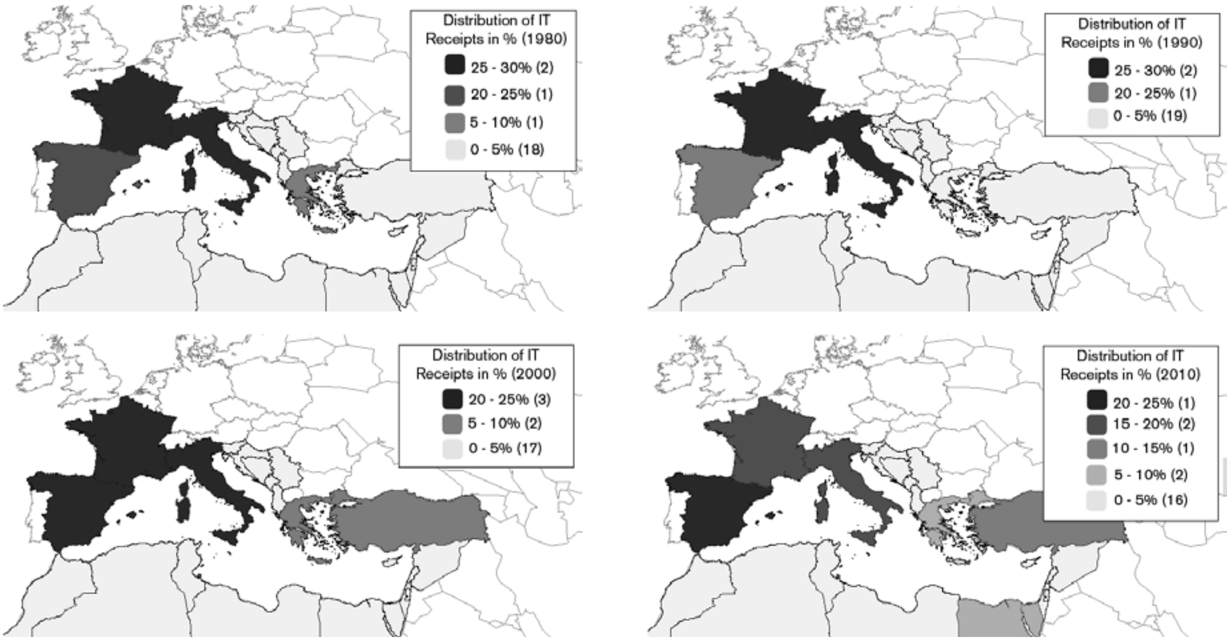
The countries indicated have experienced or are experiencing periods of civil war, such as Lebanon, the countries of former Yugoslavia, Egypt, Tunisia and Syria, or have undergone or are undergoing serious economic crises, such as Albania and Cyprus. This reveals that the option of developing the tourism industry is chosen to revitalise economic growth of countries emerging from crises, provided there was a pre-existing tourism infrastructure. It also reveals that tourism does not secure national economies and that the so-called "development" induced by tourism does not ease social tension. Moreover, the analysis of international tourist arrivals sheds light on the effects of substitution of destinations experiencing a period of unrest, primarily political, for more "tranquil" destinations. Thus, as well as a strong dependence of economies on tourism, there is also cut-throat competition.

An Unequal Race for Receipts

The weight of tourism in a country's economy does not necessarily reflect the country's importance in the overall Mediterranean tourism industry. France, Spain and Italy have each obtained over 20% of tourism receipts since the 1980s, which represents approximately 60% of overall tourism receipts obtained in the Mediterranean Basin. In 2010, these three countries took in some 137 billion dollars (France: $46 billion; Spain: $52 billion; and Italy: $39 billion) whereas the Mediterranean Region as a whole had revenues of 234 billion dollars (Map 2).

Insofar as the remaining breadcrumbs, they were primarily shared by Egypt (which succeeded in collecting 5% of receipts in 2010), Turkey (10.5%) and Greece (5%). The case of Turkey is likewise illustrative of another planning model in which tourism diversifies the economy, explaining this country's low

MAP 2 **Evolution of the Distribution of International Tourism (IT) Receipts (%)**



Source: World Tourism Organisation (UNWTO), 2012.

economic dependence on the industry. In any case, approximately 51% to 60% of revenue obtained from package tours organised by foreign tour operators did not flow into the Turkish economy (Ünluonen et al, 2011).

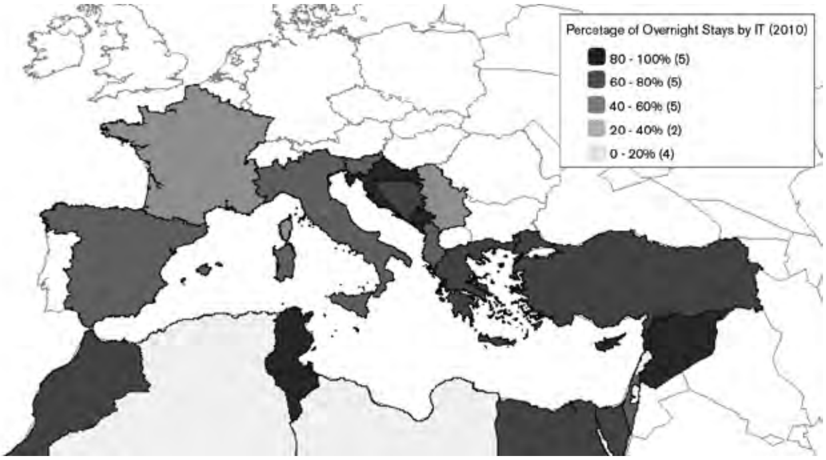
Persistence of the Effects of Peripheral Dependence on the Centre

Obtaining tourism receipts requires attracting a clientele with spending capacity. Thus, in addition to national economies' dependence on the tourism industry, the industry sector is also dependent on clientele from North Mediterranean countries. In 2010, for countries heavily dependent on tourism, the clientele was composed of over 90% international tourists in some countries (Syria, Tunisia, Cyprus, Montenegro and Croatia) and over 60% in the cases of Egypt and Morocco (Map 3).
Beyond the fact that Spain, France and Italy are less dependent on international tourism, the populations of these countries represent a high proportion of the clientele of tourism-dependent countries, a clientele that also includes people from Germany and the United Kingdom (Chart 29). This phenomenon illustrates the persistence of the effects of the dependence on the centre of regions termed peripheral in the 1960s and the inability to reduce inequalities despite 60 years of co-operation policies and development aid.

Tourism in the Mediterranean Region: Social and Environmental Impacts

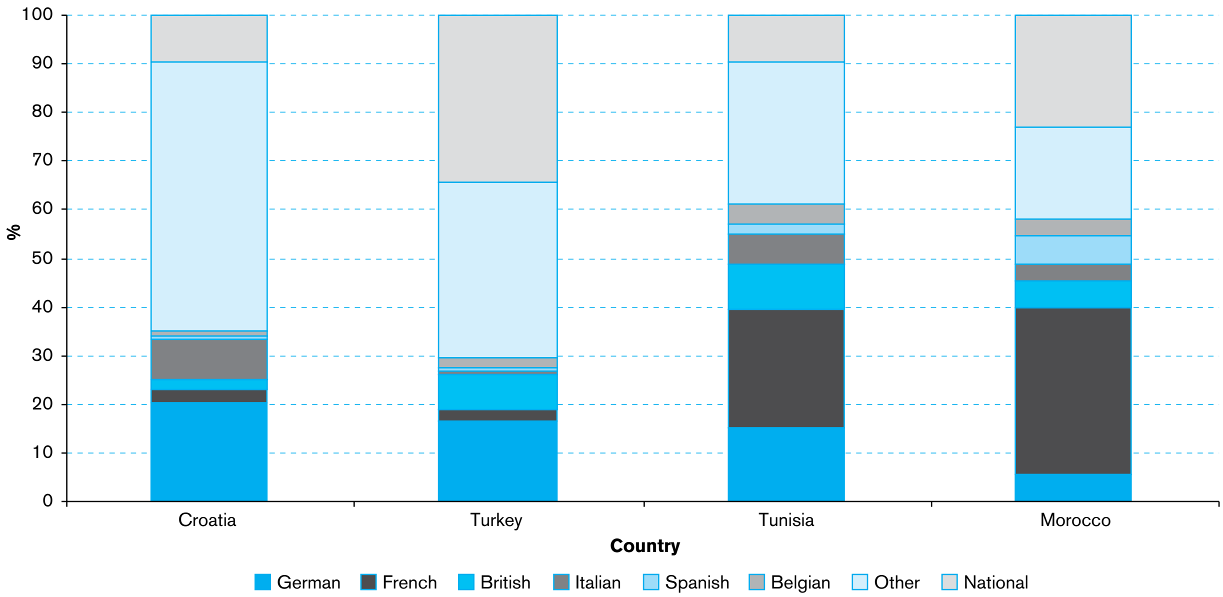
Beyond the economic dimension, questioning the sustainability of tourism in the Mediterranean area calls for analysis of its repercussions on society and the environment. Since the Mediterranean tourism industry model is based on raising capacity by increasing the number of beds available in order to increase the probability of generating receipts, this means that the tourist population is added to the resident population, engendering a spike in population density in destination areas, primarily in the summer season. In Torremolinos, Spain, for instance, the population density goes from 3,300 inhabitants/km^2 to 10,000 inhabitants/km^2 in the month of August. Map 4 allows us to make an initial observation: with the exception of Ile de France, the populations in Mediterranean countries are concentrated along the coast. The same is true of overnight stays by international tourists.

MAP 3 Percentage of International Tourism (IT) in Overall Tourism in 2010 (%)



Source: World Tourism Organisation (UNWTO), 2012.

CHART 29 Composition of Tourism in Croatia, Turkey, Tunisia and Morocco by Nationality in 2010 (%)



Source: UNWTO 2012 and national statistics from 2013.

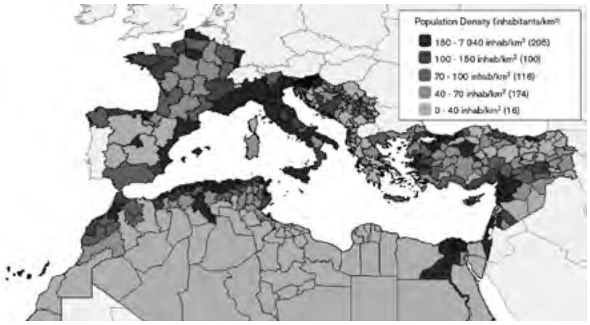
Consumption and Seasonality

The Profiles of Sustainability in Some Mediterranean Tourist Destinations project,[1] co-ordinated by Plan Bleu and Ioannis Spilanis of the University of the Aegean, has led to the following findings for the destinations studied, i.e. Torremolinos (Spain), Castelsardo and Cabras (Sardinia, Italy), Rovinj (Croatia), Alanya (Turkey), El Alamein, Mersa Matrouh and Siwa Oasis (Egypt), Djerba (Tunisia), Tipaza (Algeria) and the Tetouan coast (Morocco) (see Map 5):

- High daily water consumption by tourism with respect to the resources available leads to insufficient water supply, as in Djerba (Tunisia) and the Matrouh Governorate (Egypt), which entails water transfer policies at high economic and environmental expense;

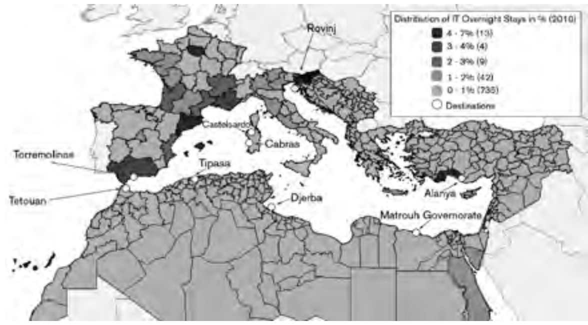
[1] http://planbleu.org/en/activites/tourisme/profiles-sustainability-some-mediterranean-tourist-destinations

MAP 4 **Population Densities in Regions of Mediterranean Countries in 2010 (inhab/km^2)**



Source: National statistics, 2013.

MAP 5 **Distribution of Overnight Stays in Regions of Mediterranean Countries in 2010 (%)**



Source: National statistics, 2013.

- The consumption of electricity, to which tourism contributes to the amount of 40% in Torremolinos (Spain) and 21% in Alanya (Turkey), can be multiplied by two (Tetouan coast, Morocco) or three (Djerba, Tunisia) during the summer season (Bourse, 2012);
- Overproduction of solid waste by tourists with respect to solid waste production by residents (in Cabras, Italy, the average annual solid waste produced is 7 kg/tourist/night as compared to 0.5 kg/inhabitant/day for the resident population), compounded by the lack of investment in collection, storage and treatment of solid waste, engenders serious public health problems as well as pollution of soil, potable water resources and the sea (Bourse, 2012).

Social Issues

Managing the development of the tourism industry along the Mediterranean coast demands infrastructure planning that is unfortunately insufficient. This phenomenon becomes even worse because so-called 3S (Sea, Sand and Sun) destinations also attract a great deal of people in search of employment. In Torremolinos, for instance, the figures for the past twenty years show that the immigration rate went from 5.21% in 1991 to 10.25% in 2008 while the population growth rate went from 5.32% in 1991 to 10.68% in 2008.

Moreover, the outcome of tourism insofar as its real capacity to create jobs is far from being as ideal as countries declare, from both the perspective of the workforce (as we saw at the beginning of this article in the case of Tunisia) and that of job type, which is closely correlated with seasonality (permanent vs. seasonal). If we then examine the capacity of tourism to redistribute the benefits of growth, the situation remains highly inegalitarian and the gaps are growing wider in the majority of cases, as for instance in Alanya, Turkey, where the share of the GDP attributable to the wealthiest sector of the population of Alanya went from 44.4% of the GDP in 1980 to over 56% in 2009 (Tosun and Çaliskan, 2011).

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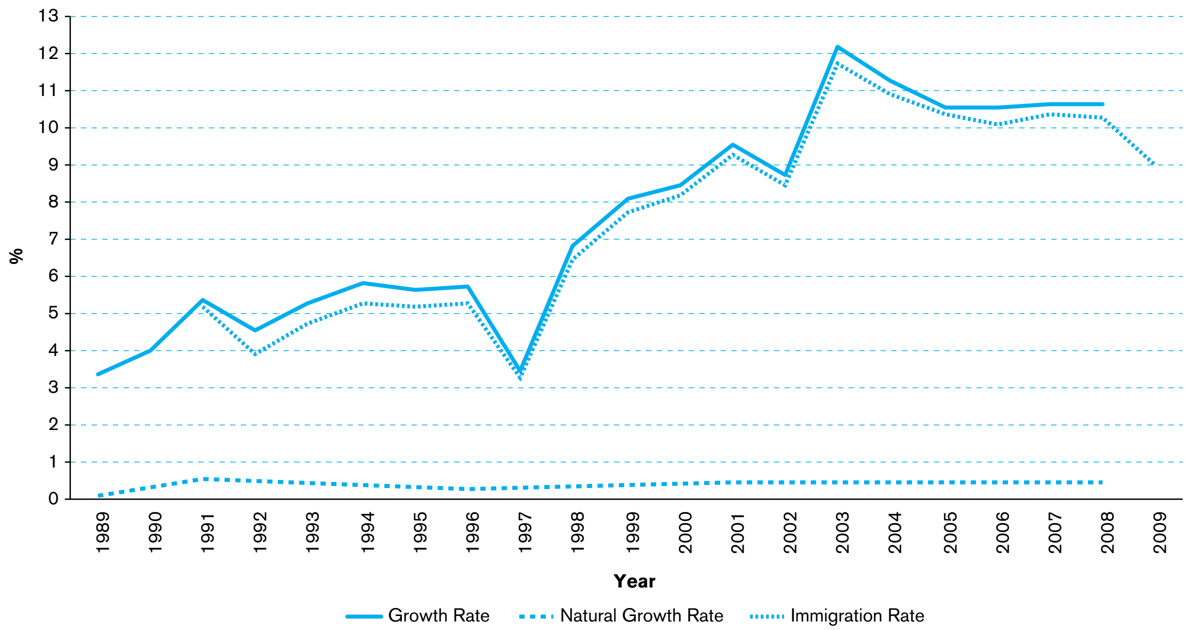
In view of these results, the conclusion is unequivocal: tourism does not play the role it should to improve the sustainability of the Mediterranean Basin. Unequal relations between the North and the rest of the Mediterranean Region, but also among North Mediterranean countries, as well as the lack of cooperation between countries to realise the dream of a "Mediterranean destination" must necessarily be corrected to lend tourism the role it could play in improving material living conditions for local populations and the manner of accumulation of wealth in

CHART 30 **Demographic Evolution of the City of Torremolinos, Spain**



Source: Spanish National Statistics Institute (Instituto Nacional de Estadística - INE), 2013.

each country. This calls for recasting the model for the tourism industry in the Mediterranean Region and implementing initiatives such as that of a quality label and a sustainable tourism observatory developed by Spilanis, as recently done in Greece in a partnership between the Greek government and the World Tourism Organisation (UNWTO).[2]

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[2] "First European Sustainable Tourism Observatory under UNWTO auspices opens in Greece" http://media.unwto.org/en/press-release/2013-02-20/first-european-sustainable-tourism-observatory-under-unwto-auspices-opens-g